



## Business and Income Taxes

### Audit Surveys

The Department invites taxpayers and tax preparers to respond to a survey concerning their experience with our audits.

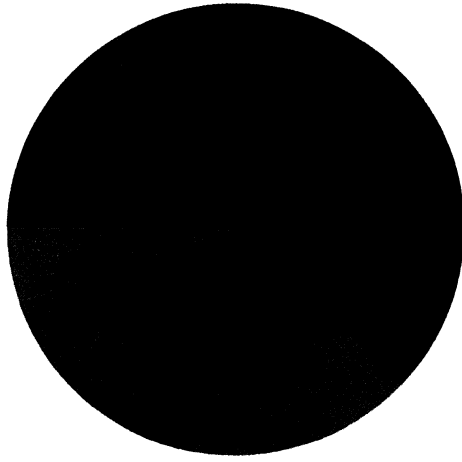
Twelve questions are asked with answers ranging from strongly agree to strongly disagree and non applicable.

Survey results from 2008 through September 16, 2011 are displayed on the attached pages.

**Individual Income Tax Audit Surveys (Calendar Year 2008)**

Number of Surveys=138; Total Number of Questions per Survey= 12;

Total Number of Questions= 1,656



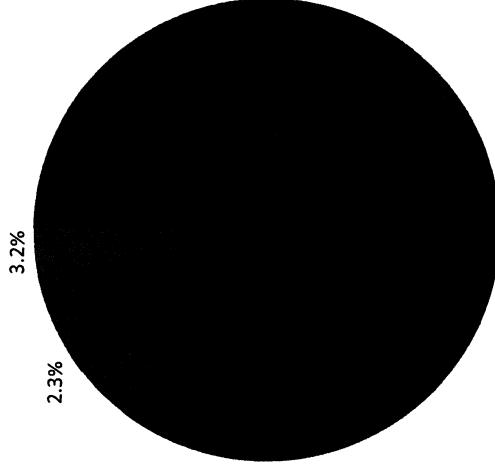
Score

- 5 (Strongly Agree)
- 4 (Agree)
- 3 (Neutral)
- 2 (Disagree)
- 1 (Strongly Disagree)
- N/A (Not Applicable)

**Individual Income Tax Audit Surveys (Calendar Year 2009)**

Total Number of Surveys=190; Total Number of Questions per Survey= 12;

Total Number of Questions= 2,280



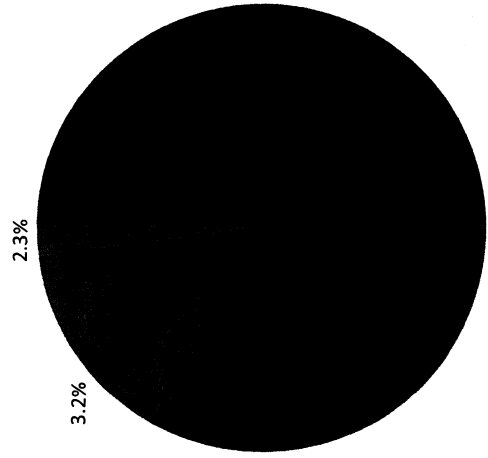
Score

- 5 (Strongly Agree)
- 4 (Agree)
- 3 (Neutral)
- 2 (Disagree)
- 1 (Strongly Disagree)
- N/A (Not Applicable)

**Individual Income Tax Audit Surveys (Calendar Year 2010)**

Total Number of Surveys=159; Total Number of Questions per Survey= 12;

Total Number of Questions= 1,908



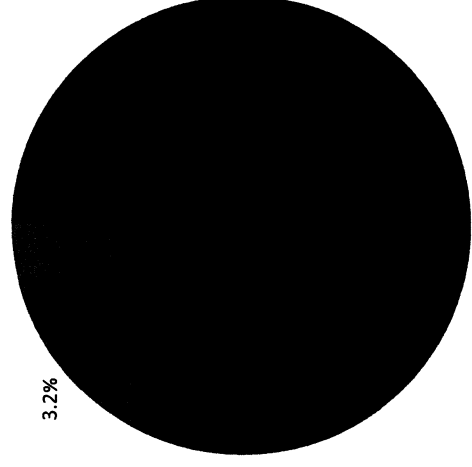
Score

- 5 (Strongly Agree)
- 4 (Agree)
- 3 (Neutral)
- 2 (Disagree)
- 1 (Strongly Disagree)
- N/A (Not Applicable)

**Individual Income Tax Audit Surveys (Calendar Year 2011)**

Total Number of Surveys=76; Total Number of Questions per Survey= 12;

Total Number of Questions= 912 (through 9/16/2011)

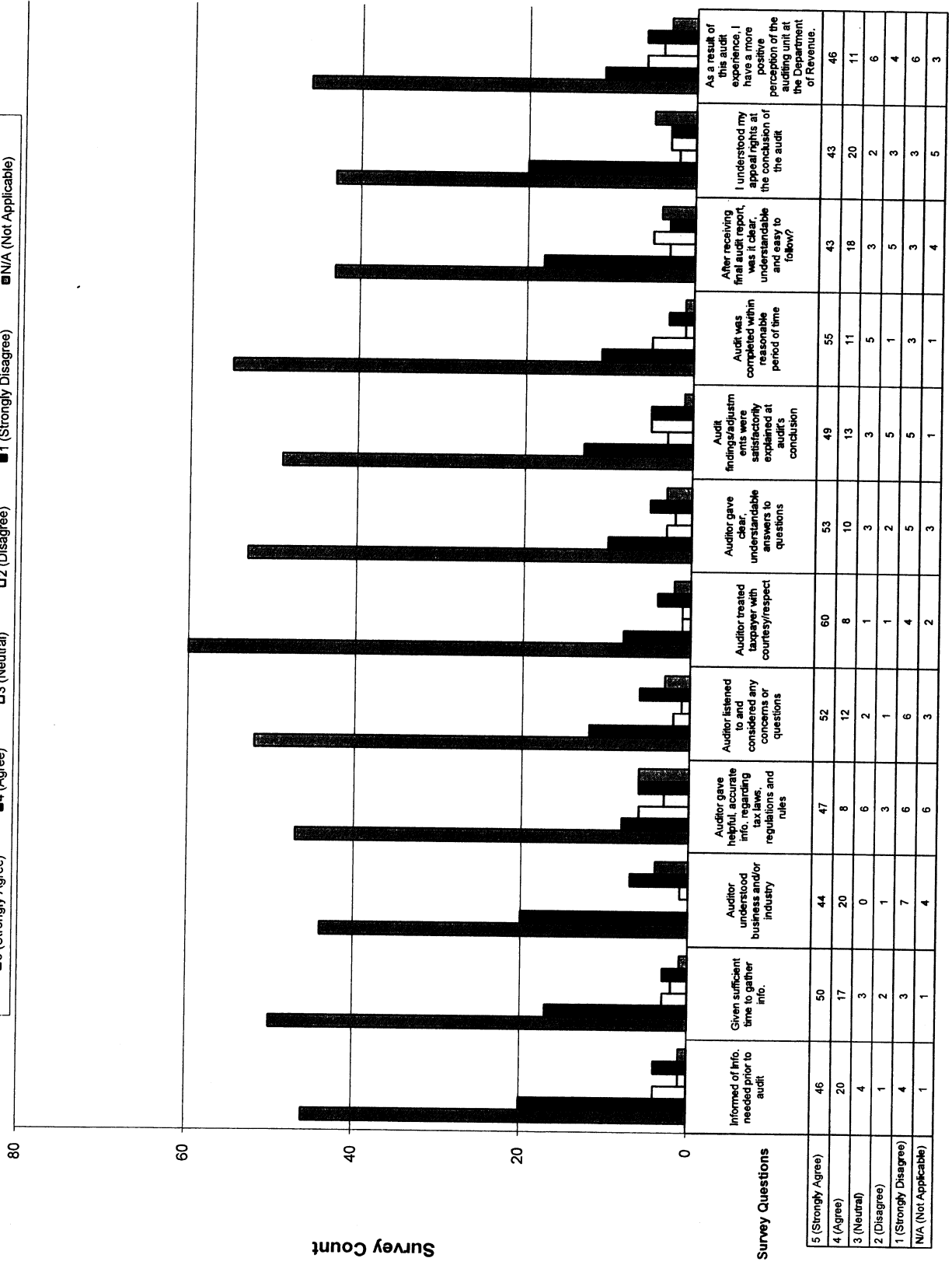


Score

- 5 (Strongly Agree)
- 4 (Agree)
- 3 (Neutral)
- 2 (Disagree)
- 1 (Strongly Disagree)
- N/A (Not Applicable)

# Customer Service Satisfaction Survey (Calendar Year 2011)

☐ 5 (Strongly Agree)   
 ☐ 4 (Agree)   
 ☐ 3 (Neutral)   
 ☐ 2 (Disagree)   
 ☐ 1 (Strongly Disagree)   
 ☐ N/A (Not Applicable)





The following are kudos from citizens received by the Montana Department of Revenue from March through August of 2011.

## Kudos and Compliments

The experience of submitting my Montana taxes electronically was a very pleasant one. Thank you for providing such an easy way to do this.

Someone put in a lot of good work on this.

— A Citizen

Dale Young was great. He took the time to go through each line of the worksheet on my tax return to help me figure out how to fill it out. I couldn't have done it without him. You have a good employee.

I have talked to several of your employees at the Call Center and they are all great.

— A Citizen

Congratulations to state liquor licensing staff who were complimented in a recent *Missoulian* article

as being helpful to citizens applying for liquor licenses in Montana.

— John Flynn, Liquor Control Division

Jessie Briggs: Thank you for your assistance in forwarding my W-2 form.

help out so much. Best wishes and may a warm wind blow on your back.

I received it just a few days ago. This is just another great example of how Montana people

— A Citizen

Julie McKenna: Wow! What can I say? I am overwhelmed at your compassion, understanding, and kindness.

Your words are so touching and mean the world to me. Your every act of kindness I cherish.

I left all my colleagues, family, husband, friends, and career on the East Coast to come West knowing no one except my sister and you, who are an example of blessings I have found here in Montana.

You represent Montana well. Maybe one day we will meet.

— A Citizen

I would like to pass along a compliment I received for Karla Roche in Accounts Receivable and Collections.

taxpayer owes money to the state and she said that Karla is the nicest person, very easy to talk to, and completely understanding.

A taxpayer called and asked to talk to Karla. The

— Sheila Cerovski, Call Center

It was my pleasure to get my taxes done by the gracious and helpful volunteers at Free File in the Great Falls senior center on March 9.

Thank you so much to the Department of Revenue and the rest of the sponsors of this program. It is a great help.

This is the fourth year I have used this service.

— A Citizen

I would like to pass along a compliment I received for Karla Roche in Accounts Receivable and Collections.

A taxpayer called and asked to talk to Karla. The taxpayer owes money to the state and she said that Karla

Janice Wilson: I'm going to have to buy you a box of candy and flowers for all the help you've given me!

Leona Stewart: I want to acknowledge that I received your correspondence informing me that you filled out and filed my Form 2EZ.

My situation can seem impossible at times and your assistance is appreciated more than you know.

Dan Bucks: I recently made two claims with Unclaimed Property within your department. I want to compliment your staff on an excellent job they did.

I am a retired Human Resource Director with more than 30 years experience with Fortune 150 companies. Your two team members Lori Crawford and Jenni Wilmot, exhibited world class customer service in dealing with my claim.

I E-filed my tax return on TAP and it worked great.

Even though I have a dial-up modem I was able to add Silverlight, fill out my return, and submit it, as well as see my prior year return.

Cascade County Office Staff: A special thanks to all of you for the caring help you gave to me in dealing with my problem.

Paul Duncan: I received your decision relative to my claim for a tax credit for air conditioning I had installed.

After reviewing the documentation, I have no reason to question your decision. Clearly, I was misinformed.

I commend you for the way you handled this matter. You were totally professional during our communications—both on the telephone and in writing.

I have called the Call Center and the matter has been handled.

Honestly, I expected this matter to take a lot longer than it did. I'm very impressed with how quickly you took care of

is the nicest person, very easy to talk to, and completely understanding.

— *Sheila Cerovski, Call Center*

I really appreciate it.

— *A Tax Preparer*

Once again, thank you very much. It's comforting to know there are individuals such as yourself doing service work with kindness.

— *A Citizen*

I would consider them the model of customer service professionals. They made my experience very positive and it speaks well to the quality of State of Montana employees.

— *A Citizen*

The instructions were easy to follow and it was easy to use.

Thank you!

— *A Citizen*

You went out of your way to help me.

— *A Citizen*

You promptly provided me with complete information relative to this matter and your decision. In addition, you were both pleasant and helpful in our telephone conversations.

The manner in which you handled this matter could serve as guidance for all civil servants who must deal with difficult matters.

— *A Citizen*

me.

Thank you so very much.

— *A Citizen*

Dani Tenneson: You have been awesome to work with! Over the time it took me to unravel a mess, you were patient, always professional, always helping with finding a solution for me.

I'm writing to say thank you for some excellent business tax help I received from Heather Gurnsey.

I called for advice on deducting home office expenses for an S Corp. Heather provided very friendly and knowledgeable advice on what is admissible and what isn't.

I just want to pass along a kudos for Albert Murray. He has been assisting us with some tax work, and has been very helpful and willing to help get the questions answered.

During a recent conversation with a tax preparer about another issue, he asked me what my job entailed these days.

After I told him, he said that he calls the Call Center about once per week and has never had a bad experience. He listed the names of each of the Call Center staff and said

I would like to take a few minutes to let you know about your staff at the Department of Revenue.

I was debating whether or not to amend my 2009 taxes. I could not locate the copy of my 2009 taxes and sent in a request for a copy of them. I received a faxed copy the very next day. This was outstanding in my book. I thought I would have to wait at least two weeks.

Then I had questions about forms and calculations and decided to drop by the DOR to see if someone could answer my questions.

I was greeted in a quick and friendly manner. Then while I was waiting, someone came out to tell me it would be about five minutes. This was awesome! They could have just let me sit there, but someone took the time to let me know what was going on.

When the agent came out, he introduced himself as Kevin Bock. He was a pleasant person who not only answered

Dick Popiel: Thank you very much for the prompt and comprehensive response.

Dealing with Montana, be it in the public or private sector, continues to be a joy compared to other parts of the country.

You are a wonderful person and I am honored to call you my friend.

— A Citizen

One of the many things I love about Montana is when dealing with state and local governments here, instead of getting a hostile, disinterested bureaucrat who specializes in how to say "no," I get someone like Heather, who is surprisingly good-hearted and willing to help.

— A Citizen

He was very nice to deal with.

Thank you.

— A Citizen

that each one has been helpful and courteous each time he has called.

Call Center staff – you all make me very proud to be a part of your world!

— Cathy Fitzgerald, Bureau Chief

my questions, but went above and beyond to make sure I had all the right information to receive the best refund, which included me returning with more information so he could file my amendment right there. I am so thankful Kevin took time from his busy day to assist me.

I had no idea what to expect when I started my 2009 tax amendment journey. I knew I would have to get some questions answered to file the right paperwork the right way. Frankly, it appeared to be an overwhelming task. The saving grace was your staff. Everyone who touched my paperwork, from the person who faxed it, to the receptionists at the window, to Kevin, were, in a word, outstanding.

I appreciate the time they took to help. Please keep encouraging your staff to do what they do.

— A Citizen

Thanks!

— A Citizen

Julie McKenna: Thank you so much for your help. It is really nice when a public employee gives a little extra and helps out, especially when things are so hard everywhere.

— A Citizen

Nancy Klein: Thank you for all of your input on getting this tax paperwork taken care of so expeditiously. I did get the check this past Wednesday, thanks to you.

Keep up the good public relations. It really works.

— A Citizen

The Department of Revenue is very lucky to have you as part of their teams. You are an asset for them.

Call Center Staff: Thank you so much for all your help. Every call was answered fast and staff provided great info!

Thanks again.

— A Citizen

DOR: I just want to thank you for doing your job and doing it well.

Again, thanks and have a great day.

— A Citizen

I made a small error on my return and it meant you had to issue me more money and I really appreciate it. It's good to see things working properly.

Marla Wolstein: Wow! Compared to my state's DOR, you are greased lightening!

Thank you.

— A CPA from Another State

Sandy Booth was just great when she helped me with my question about my refund today. She was patient, polite, and courteous and couldn't have been nicer.

— A Citizen

Vicky Holland: Just want to let you know that I agree with the board's decision. But more than that, I appreciate your hard work on this tax issue, and all your help in presenting a fair opinion during the hearing.

do it all as he had prepared the appeal. In any event, it all worked out and I am satisfied.

Again, thanks for all your help.

— A Citizen

I was totally unprepared as I expected my husband to

Each time I have called the Call Center I connect almost immediately with a human being. No complicated menus or long hold times.

Keep up the great work.

Thank you very much!

— A Citizen

The following are comments from several citizens for the Call Center Staff.

- I've been in Montana since 1993 and only in Montana do real people answer their phones. The staff in offices in the previous state I lived in could learn a lesson or two from Montana.
- You should let the music play without interruptions when people are on hold. That's good music!

- People at the Montana Department of Revenue are very easy to work with. I've always received courteous service.
- I appreciate the help I get whenever I call. You guys are always great.
- I always like calling you guys because you're always so helpful.

— Cathy Fitzgerald, Bureau Chief

Jamie Schell: An employee in our Career Services Department told me you recently participated in a mock interview event with our graduating seniors.

She told me that the follow-up sessions with the students revealed that they benefitted significantly from the event,

We had a citizen who came in twice over the last week for help on a tax matter in which Cassie Scheuer assisted with both times.

The citizen wanted to be sure Cassie's supervisor was aware of what a great help she was.

Marilyn Christensen: All done. Pretty sweet-sounding words!

I want to thank you for all of your help and good work in this process. You were both competent and comfortable to work with, quite a winning combination.

Julie McKenna: Thank you so very much for your kindness. I am just thrilled that we are in the current year and we are where we should be.

Honestly, I can't thank you enough for your assistance in

Alicia Rockwood: Just a note to let you know that you were very pleasant to speak with on the phone during the audit.

Marilyn Christensen: Thank you for your prompt help. My new paralegal is from the eastern U.S. She is shocked at how Montana state government works in cooperation with its citizens.

It's nice. I thank you.

Missoula DOR Staff: I have been coming into this office for years and years and you are the most helpful people I have ever met.

Judith Hemphill: Thank you for going above and beyond duty. We are very fortunate to have public employees such as yourself here in Lincoln County.

I want everyone to know how helpful and kind Cindy Birgenheier has been assisting me with Montana property tax information. I didn't know what to do or who to turn to for information and she has been wonderful to work with.

Debra Reesman: I just want to follow up to let you know what a great employee you have in Kristi Richards. She was so pleasant and helpful when I called, and my philosophy as a businessman is to recognize people who do their job well.

particularly from the feedback that you provided them, which will help them grow in their interview skills and confidence.

— *President of a Helena College*

The citizen, commenting about Cassie, said, "She was incredibly nice! Incredible customer service!"

— *Kristin Gutowsky, Business and Income Taxes*

Thanks again.

— *A Citizen*

helping me through this.

Thank you!

— *A Citizen*

— *A Citizen*

Your helpfulness reminds me why I moved back to Montana 40 years ago.

— *Billings Attorney*

— *A Citizen*

You should hear the "big city" nightmares that I hear from other parts of the world.

— *A Citizen*

— *A Citizen*

I want to compliment Kristi's customer service—she is a bright reflection on your government agency.

— *An Out-of-State Ranch Owner*



## Post-Audit Survey Kudos and Compliments

I wish all auditors were like Bonnie Kennedy. She was professional, reasonable, and good to work with.

Thanks.

— A Citizen

I went into this audit with considerable apprehension, but Sylvia Headley immediately put me at ease and never made me feel defensive.

records and praised me for what I had been doing.

Thank you.

— A Citizen

She helped me better understand easier ways to keep my

Bonnie Kennedy is a very nice person and understanding.

Revenue—the reasons being are her intelligence and personality, both of which are stellar.

— A Citizen

She is a great asset to the Department of

The audit was thorough and it was done in a very professional manner.

treated me with respect and courtesy.

— A Citizen

Russ Davis answered all my questions and

Morgan Hendricks was very friendly, made me feel comfortable and at ease from the beginning, and presented herself quite well.

Good work.

— A Citizen

My auditor, Alicia Rockwood, was a new hire. Her training supervisor was with her and

both did a super job.

— A Citizen

Morgan Hendricks was very professional.

— A Citizen

Sylvia Headley embodies the type of professional that is a pleasure to work with.

— A Citizen

Thank you, Cheryl Yauger, it was my pleasure working with you!

— A Citizen

Cheryl Yauger was professional and very helpful throughout the audit. She was a pleasure to work

with and you're fortunate to have her on your staff.

Alicia Rockwood was a very friendly person. We enjoyed her and were comfortable with her during

the audit.

— A Citizen

Morgan Hendricks does a great job.

— A Citizen